

Petition for Appointment of Probate Conservator

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 6/6/16. <u>Note:</u> Although the petition indicates Ms. Bushong is requesting appointment as Co-Conservator with Ms. Mott, the proposed order and letters indicate only Ms. Bushong. Examiner has interlineated the proposed order and letters to include both co-conservators as requested; however, the revised Letters will require Ms. Mott's signature for issuance.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 1- Ruddle

Second and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Her Attorney; for Authorization to Sell Personal Property and Retain Proceeds

DOD: 7/10/15	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 8/1/07 – 7/10/15	
	Accounting - \$5,846.33	
Cont. from	Beginning POH - \$ 599.73	
Aff.Sub.Wit.	Ending POH - \$1,872.41	
Verified		
Inventory	Subsequent account period: 7/11/15 – 4/20/16	
PTC		
Not.Cred.	Accounting - \$2,678.70	
Notice of Hrg	Beginning POH - \$1,872.41	
Aff.Mail	Ending POH - \$1,462.91	
Aff.Pub.	Conservator - \$1,210.40	
Sp.Ntc.	(8.65 Deputy hours @ \$96/hr and 5.0 Staff hours @ \$76/hr)	
Pers.Serv.		
Conf. Screen	Attorney - \$1,250.00 (less than allowed per Local Rule)	
Letters		
Duties/Supp	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
Objections		
Video Receipt		
CI Report	Petitioner prays for an Order:	
9202	1. Approving, allowing and settling the second and final account;	
Order	2. Authorizing the conservator and attorney fees and commissions;	
Aff. Posting	3. Authorization to sell conservatee's T.V. and retain the proceeds for partial payment of fees and costs.	
Status Rpt	4. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions.	
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 6/23/16
		Updates:
		Recommendation:
		File 2- Hembree

Second and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Her Attorney

DOD: 7/18/15		FRESNO COUNTY PUBLIC GUARDIAN, Conservator, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 7/22/09 – 7/18/15	
		Accounting: \$75,156.22	
		Beginning POH: \$4,751.52	
		Ending POH: \$2,389.91	
Cont. from		Account period: 7/19/15 – 4/22/16	
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting: \$4,115.03	
<input checked="" type="checkbox"/>	Verified	Beginning POH: \$2,389.91	
<input type="checkbox"/>	Inventory	Ending POH: \$2,521.99	
<input type="checkbox"/>	PTC	Conservator: \$2,464.96 (for 17.76 Deputy hours @ \$96/hr and 10 Staff hours @ \$76/hr from 10/5/13 – 4/22/16. Petitioner has received partial compensation for the period of this accounting pursuant to petition and Court order dated 12/11/13.	
<input type="checkbox"/>	Not.Cred.	Attorney: \$1,250.00 (per local rule)	
<input checked="" type="checkbox"/>	Notice of Hrg	Bond fee: not requested due to receipt of SSI	
<input checked="" type="checkbox"/>	Aff.Mail	Petitioner states the Conservatee died intestate. The only asset is cash of \$2,521.99. After only partial payment of the court-ordered fees and commissions, there will be no assets to distribute to heirs. Petitioner requests that due to the insufficiency of the estate, a lien be imposed against the estate for any unpaid balance.	
<input type="checkbox"/>	Aff.Pub.	Petitioner prays for an order:	
<input type="checkbox"/>	Sp.Ntc.	1. Finding that the conservatorship of the person and estate terminated on 7/18/15, the Conservatee's date of death;	
<input type="checkbox"/>	Pers.Serv.	2. Approving, allowing and settling the Second and Final Account and Report;	
<input type="checkbox"/>	Conf. Screen	3. Authorizing the conservator's and attorney's compensation;	
<input type="checkbox"/>	Letters	4. Imposing a lien against the estate for any unpaid balance of the authorized fees and commissions; and	
<input type="checkbox"/>	Duties/Supp	5. Any other orders the Court considers proper.	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc

Reviewed on: 6/23/16

Updates:

Recommendation:

File 3- Davis

Attorney Dean Hiyama (Petitioner; formerly for Diane Mosolf, Conservator)

Petition for Attorney Fees

			DEAN HIYAMA, Attorney, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
			Petitioner states:	Note: Substitution of Attorney filed 5/10/2016 shows Attorney Hiyama substituted out of this matter, and the Conservator is now represented by Attorney Downing, who will be responsible for the filing of the Third Account, for which a status hearing is set on <u>6/7/2017</u> .
			<ul style="list-style-type: none"> He was retained on 4/14/2015 to represent Diane Mololf, Conservator of the Person and Estate; He represented the Conservator for a period of 12 months in order to provide the second accounting for the Conservatorship and an ex parte petition for withdrawal of funds from blocked account; Representation was terminated on 5/5/2016; He has performed legal services as set forth in the Petition in good faith and in the best interests of the Conservatee and the Conservatorship Estate; Petitioner performed legal services from the period of 9/8/2015 through 5/5/2016, that include [in brief sum: preparation of second accounting; amended second accounting; ex parte petitions for withdrawal of funds; preparation of confidential care facility billing statements; preparation of receipts]; detailed billing and costs itemized in Exhibit A; Declaration of Dean Hiyama in support attached as Exhibit B; for 9.9 hours at attorney rate of \$250/hour and legal assistant rate of \$110/hour); Petitioner is advises that the Conservatorship Estate is worth ~\$1,225,632.49; In consideration of the time expended, the responsibility assumed, complexity of the matter, expertise of Petitioner, and the best interest of the Conservator and the size of the Conservatorship Estate, Petitioner believes \$1,325.00 is reasonable compensation for services performed; Petitioner has also incurred costs for filing fees for the Conservatorship [totaling \$955.50]; 	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice		Petitioner requests this Court approve the petition and direct the Conservator of the Estate to pay the sum of \$2,280.50 to Petitioner from the Conservatorship Estate for payment of fees and reimbursement of costs.	
				Reviewed by: LEG Reviewed on: 6/23/16 Updates: 6/24/16 Recommendation: File 4- Fratis

Attorney

Hicks, Julie A. (for Guardian Angelica Artigas – Petitioner)

Objector

Artigas, Vanessa A. (Pro Per – Mother – Objector)

Petition for Order Re Guardianship Visitation

See petition, objection for details.			NEEDS/PROBLEMS/ COMMENTS:
Cont. from 051716			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Minute Order 5/17/16: A copy of the petition is served on Vanessa Artigas by Deputy Dau in open court. The Court orders that any response is to be filed and properly served by 6/14/16.
			Note: Vanessa Artigas (Mother) filed an Objection on 6/13/16; however, no proof of service has been filed. See Page 2.
			Reviewed by: skc
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 5- Artigas

Status RE: Filing of the Next Account

DOD:10/7/12	<p>PAUL T. CHAMBERS was appointed Practice Administrator on 10/16/13 pursuant to Probate Code §9764.</p> <p>Bond of \$47,000.00 was filed 3/17/14 pursuant to Probate Code §9764(d); however, may not have been renewed pursuant to Minute Order 3/3/15.</p> <p>The First Account of IOLTA Trust Funds by Court-Appointed Practice Administrator was settled on 2/3/15 and the Court set a status hearing for 2/9/16 for the filing of the next account.</p> <p>On 2/9/16, there were no appearances and the Court set an Order to Show Cause for 3/22/16.</p> <p>Minute Order 3/22/16 states: The court vacates the Order to Show Cause. Counsel requests 60-90 days. If the petition is not filed at least two court days prior to 6/28/16, Counsel must file a verified status report and both counsel and Joan St. Louis are ordered to be personally present in court, at which time the Court will consider sanctions. If the petition is filed at least two court days prior to 6/28/16, no appearance is necessary.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need second/final account or current written status report pursuant to Local Rule 7.5.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 6/23/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6- St. Louis</p>

**First and Final Account and Report of executor and Petition for Its Settlement,
for allowance of Commissions and Fees and for Final Distribution.**

DOD: 5/25/14		BRIAN J. GRIFFIN , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: ??	<p>Continued from 6/7/16. As of 6/23/16 the following issues remain:</p> <ol style="list-style-type: none"> Account period is not stated. Request for reimbursement of costs to the Executor includes the following expenses that need clarification: <ol style="list-style-type: none"> \$342.42 for ATT Wireless from 10/7/14 – 10/26/15 (why should the estate pay for wireless charges after the decedent's death?) \$1,182.12 for ATT Uverse from 10/7/14 – 11/9/15 (why should the estate pay for cable/internet charges after the decedent's death?)
Cont. from 060716		Accounting - \$114,262.62	
Aff.Sub.Wit.		Beginning POH - \$113,000.00	
✓ Verified		Ending POH - \$ 39,335.43	
✓ Inventory		Executor - \$2,549.81 (less than statutory)	
✓ PTC		Executor costs - \$20,935.87 (incurred to maintain and protect the residence until it could be sold.)	
✓ Not.Cred.			
✓ Notice of Hrg		Attorney - \$2,549.81 (less than statutory)	
✓ Aff.Mail W/			
Aff.Pub.		Closing - \$100.00	
Sp.Ntc.			
Pers.Serv.		Distribution, pursuant to Decedent's Will, is to:	
Conf. Screen			
✓ Letters 10/24/14		Michael J. Griffin - \$9,239.95	
Duties/Supp		Heather Griffin - \$ 659.99	
Objections		Crystal Griffin - \$ 660.00	
Video Receipt		Brian Griffin - \$ 660.00	
CI Report		Bill Griffin - \$ 660.00	
✓ 9202		Holly Griffin - \$ 660.00	
✓ Order		Susan Kowolski - \$ 330.00	
Aff. Posting		Mary Beth Kowolski - \$ 330.00	
Status Rpt			
UCCJEA			
Citation			
✓ FTB Notice			
			Reviewed by: KT
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 7- Griffin

8 Deyviana Deloach and Benjamin Vasquez (GUARD/P)

Case No. 15CEPR00942

Guardian Ikemefuna Onyegegbu (Pro Per, maternal uncle)

Probate Status Hearing Re: Active Warrant for Lisa Lee Marquez

		IKEMEFUNA N. ONYEGEGBU and LISA LEE MARQUEZ , maternal uncle and aunt, filed a Petition for Appointment of Guardian on 9/23/2015.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5/24/2016.</u> Minute Order states the misdemeanor matter for which Lisa Lee Marquez has an active warrant is set for arraignment on 6/10/2016; the admonishes that this is the last continuance and that an order for Ms. Marquez to not reside in the home with the minor could still be made.
Cont. from 042616, 052416		Order Appointing Guardian filed 3/8/2016 appoints only IKEMEFUNA N. ONYEGEGBU as Guardian of the Person of Deyviana Deloach and Benjamin Vasquez only (DeShawn Deloach is no longer subject to the instant petition as he reached age 18.) <i>Letters of Guardianship</i> issued only to IKEMEFUNA N. ONYEGEGBU on 3/8/2016.	
Aff.Sub.Wit.			
Verified		Court set this matter on 4/26/2016 for the status regarding the active warrant for LISA LEE MARQUEZ.	
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: LEG
Status Rpt			Reviewed on: 6/23/16
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 8- Deloach & Vasquez

Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Commissions

DOD: 7/11/15		JERRY BROWN aka WILLIAM GERALD BROWN, Executor with Full IAEA without bond, is Petitioner. Petitioner is the sole heir and waives accounting. I&A: \$1,100,000.00 POH: \$1,100,000.00 (real property) Executor waives compensation Attorney: \$24,000.00 Distribution pursuant to the decedent's will: Jerry Brown: entire estate (real property)	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 6/23/16
Updates:
Recommendation: SUBMITTED
File 9- Brown

12 Jasmine Sandoval, Vincent Rodriguez (GUARD/P) Case No. 15CEPR01224

Petitioner/Guardian: Ray Ramos, II (pro per)

Respondent/Father: Monty Villegas (pro per)

Petition for Modification of Visitation

		RAY ANTHONY RAMOS, II , Guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS: This petition is as to VINCENT only.
		RAY ANTHONY RAMOS, II , step-father, was appointed as guardian on 4/4/16.	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified	Please see petition for details.	
	Inventory		
	PTC	Response to Modification of Visitation filed by Monty Villegas on 5/31/16	
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 6/24/16
			Updates:
			Recommendation:
			File 12- Sandoval & Rodriguez

Ex Parte Petition for Appointment of Guardian Ad Litem (Isabella Rose Anderson)

		JAMES S. ANDERSON , Settlor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states he is the settlor of the trust and father of the minor child.	Minute Order 5/31/16: The Court will have the examiner make further inquiries on the listserv with regard to the issue.
Cont. from 030816, 042616, 053116		Petitioner seeks appointment of CHRISTINE ANDERSON HOLT to represent the interests of the minor Isabella Rose Anderson to consent to modification of a trust under which the minor is the beneficiary. See Page A re details.	Note: Memorandum of Points and Authorities filed 4/19/16 provides authority and discussion. Please see Memorandum of Points and Authorities filed 4/19/16 for details.
	Aff.Sub.Wit.		
✓	Verified	Ms. Holt is the aunt of the minor and is a competent and responsible person to protect the interests of the minor. Baker Manock & Jensen, PC has represented Ms. Holt on other matters. Baker Manock & Jensen, PC is not representing her in this matter.	Note: Minute Order 3/8/16 re Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust states the Court is not requiring the Motion to Compel; Petition granted.
	Inventory		
	PTC	The following issues remain noted for reference:	<ol style="list-style-type: none"> 1. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350. Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Holt in connection with this matter. 2. Ms. Holt is the named successor trustee. The Court may require clarification or authority re possible conflict. 3. It appears Ms. Holt already signed a consent to modification of the trust as GAL on behalf of the minor beneficiary on 12/28/15; however, on that date she had not been appointed. If appointed, further consent may be appropriate.
	Not.Cred.		
✓	Notice of Hrg	See also Memorandum of Points and Authorities filed 4/19/16	<div>Reviewed by: skc</div> <div>Reviewed on: 6/23/16</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 13A- Anderson</div>
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

13B The Isabella Rose Anderson Trust dated July 8, 2004 Case No. 16CEPR00031
Attorney Jaech, Jeffrey A. (for Settlor James S. Anderson – Petitioner)

**Amended Petition for Appointment of Guardian Ad Litem
(Issue of Ava Elizabeth Anderson and Isabella Rose Anderson)**

		JAMES S. ANDERSON , Settlor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states he is the settlor of the trust and father of the minor child.	<u>Minute Order 5/31/16:</u> The Court will have the examiner make further inquiries on the listserv with regard to the issue.
Cont. from 053116			
	Aff.Sub.Wit.		<u>Note:</u> Minute Order 3/8/16 re Ex Parte Petition for Limiting the Class of Beneficiaries Whose Consent is Needed to Compel Modification of the Trust states the Court is not requiring the Motion to Compel; Petition granted.
✓	Verified		
	Inventory		The following issue remains noted for reference:
	PTC		
	Not.Cred.		4. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See Note below caption on Petition for Appointment Form DE-350.
✓	Notice of Hrg		
✓	Aff.Mail	W	Petitioner states the proposed GAL is not represented by Baker Manock & Jensen PC. Need clarification re representation of Ms. Anderson in connection with this matter.
	Aff.Pub.		
	Sp.Ntc.		<u>Note:</u> Memorandum of Points and Authorities filed 4/19/16 provides authority and discussion re proposed GAL not being represented by an attorney.
	Pers.Serv.		
	Conf. Screen		Reviewed by: skc
	Letters		
	Duties/Supp		Reviewed on: 6/23/16
	Objections		
	Video Receipt		Updates:
	CI Report		
	9202		Recommendation:
✓	Order		
	Aff. Posting		File 13B- Anderson
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

13B

14 Ronald Cornelsen (Spousal)**Case No. 16CEPR00214****Attorney: Randy M Long (for Petitioner Kathleen A. Cornelsen)****Spousal or Domestic Partner Property Petition**

DOD: 10/24/2015	KATHLEEN A. CORNELSEN , surviving spouse is petitioner	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 041116, 051816			
		Aff.Sub.Wit.	
✓		Verified	
		Inventory	
		PTC	
		Not.Cred.	
✓		Notice of Hrg	
✓		Aff.Mail	w/
		Aff.Pub.	
		Sp.Ntc.	
		Pers.Serv.	
		Conf. Screen	
		Letters	
		Duties/Supp	
		Objections	
		Video Receipt	
		CI Report	
		9202	
✓		Order	
		Aff. Posting	
		Status Rpt	
		UCCJEA	
		Citation	
		FTB Notice	
		Reviewed by: KT	
		Reviewed on: 6/16/16	
		Updates:	
		Recommendation:	
		File 14- Cornelsen	

Petitioner: Amber Lynn Johnson

Amended Petition to Determine Succession to Real Property

DOD: 11/13/09		AMBER LYNN JOHNSON , daughter, is petitioner. 40 days since DOD. No other proceedings. Decedent died intestate. I & A - \$65,000.00	NEEDS/PROBLEMS/COMMENTS: 1. Petition was opened with a fee waiver. Court fees are considered a cost of administration. Therefore filing fees of \$435.00 are due. 2. Need Order
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	N/A	Petitioner requests Court determination that Decedent's interest in the real property located in Fresno, pass to her pursuant to intestate succession.
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT Reviewed on: 6/23/16 Updates: Recommendation: File 15- Johnson

16 Jazzmen Osornio (GUARD/P)**Case No. 16CEPR00279**

Petitioner Esqueda, Rosa Maria (Pro Per – Paternal Grandmother)

Objector Lopez, Olga (Pro Per – Mother)

Petition for Appointment of Guardian of the Person

Age: 6.5 years		<u>TEMPORARY EXPIRES 06/28/2016</u> ROSA MARIA ESQUEDA , paternal grandmother, is petitioner <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 05/17/2016: Petitioner represents that she just received the objection last week; any reply is to be filed and properly served at least 15 days prior to 06/28/2016. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Jesus Osornia (Paternal Grandfather) – Unless the Court dispenses with notice. Note: Declaration of Due Diligence filed 03/14/2016 <ul style="list-style-type: none"> Maternal Grandmother (Unknown) - Unless the Court dispenses with notice. Note: Declaration of Due Diligence filed 03/14/2016 For Objector: 1. Proof of Service filed 03/17/2016 is defective as it lists Juanita Carrillo as the person served as well as the person who effectuated service.
Cont. from 051716			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail x		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv. w/		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 06/23/2016	
		Updates:	
		Recommendation:	
		File 16- Osornio	

Petitioner Gloria M. Encinas (Pro Per, paternal grandmother)

Petition for Appointment of Guardian of the Person

		TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 6/28/2016 GLORIA M. ENCINAS , paternal grandmother, is Petitioner. ~Please see Petition for details~ Court Investigator's Report was filed on 4/29/2016.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5/17/2016.</u> Minute Order states examiner notes provided in open court. Angelica Mora represents that the maternal grandfather is Jose Mora. The Court grants temporary orders; Letters are to issue forthwith from the minute order. Matter is continued for service as to James Encinas, paternal grandfather, and Jose Mora, maternal grandfather. 1. If Court does not find due diligence per the Declaration filed 5/31/2016, Court may require proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, for: <ul style="list-style-type: none"> Jose Simon Mora, maternal grandfather.
Cont. from 051716			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 17- Encinas

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 6/28/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		DAWNETTA SUZANNE REED , sister-in-law, is petitioner. (Petitioner is married to the minor's brother, Edward Curtis Reed, II.)	<u>Minute order dated 4/7/2016</u> from temporary hearing states the Court orders that visitation for Barbara Edwards (mother) shall occur as mutually agreed to by both parties.
		Court Investigator report filed 5/26/2016.	
Cont. from 053116		See petition for details.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 6/23/2016
			Updates:
			Recommendation:
			File 18- Villanueva

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA

DOD: 12/23/15		NELSON CAL BLAKEMAN , named executor without bond, is petitioner. Full IAEA – o.k. Will dated: 12/1/14 Residence: Sanger Publication: Sanger Herald <u>Estimated value of the estate:</u> Real Property - \$350,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Wednesday, November 30, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, September 6, 2017 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
Cont. from 051916				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT Reviewed on: 6/23/16 Updates: Recommendation: SUBMITTED File 19- Blakeman	

Petitioner Terry, Kathy (Pro Per – Paternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner filed declarations of due diligence regarding the paternal grandfather, maternal grandmother, and two siblings. If diligence is not found, need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> further diligence on: - Paternal Grandfather Dennis Salkeld - Maternal Grandmother - Silbings Briana Siegert and Austin Siegert
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/23/16	
			Updates:	
			Recommendation:	
			File 20- Salkeld	

Status RE: Proof of Bond

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<u>OFF CALENDAR</u> Bond filed 6/14/16; Letters issued 6/15/16
			Reviewed by: skc
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 21- Zuccarini

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. If diligence is not found, need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on maternal grandmother Angelina Valdez Soto, <u>or</u> consent and waiver of notice <u>or</u> further diligence.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/23/16	
			Updates:	
			Recommendation:	
			File 22- Lopez	

Petition to Establish Special Needs Trust and for Application of Fees

			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>Order signed 6/23/16 per Minute Order 6/7/16</p>
Cont. from 060716			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 6/23/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 23- Kermoyan</p>

Petition to Establish Special Needs Trust and for Application of Fees

			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Order signed 6/23/16 per Minute Order 6/7/16
Cont. from 060716			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 24- Kermoyan

Petitioner Ward, Amie Michelle (Pro Per – Paternal Aunt)

Petition for Appointment of Guardian of the Person

Justin Age: 14	TEMPORARY EXPIRES 06/28/2016	NEEDS/PROBLEMS/COMMENTS:
	AMIE WARD , paternal aunt, is Petitioner.	Petition is as to Justin Marbry only.
	<u>Please see petition for details</u>	Note: Hearing on the General Petition for Guardianship of the minors Samantha Marbry, and Charlotte Marbry, filed by Mary Parfenova, is set for 07/14/2016.
Cont. from		1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian for:
Aff.Sub.Wit.		<ul style="list-style-type: none"> Michael Marbry, Sr. (Paternal Grandfather) – Unless the Court dispenses with notice.
✓ Verified		Note: Declaration of Due Diligence filed 05/02/2016.
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
Aff.Mail	X	
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.	w/	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 06/23/2016
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 25- Marby

Petitioner: Danny Brown (pro per)

Petition to Determine Succession to Real Property

DOD: 5/29/05		DANNY BROWN , son, is petitioner. 40 days since DOD. No other proceedings. Decedent died intestate. I & A - NEED Petitioner requests Court determination that Decedent's 2.5% interest in real property located in Oakland California passes to him pursuant to intestate succession.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory and appraisal completed by the probate referee. 2. Need order.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			N/A
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	X		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: KT
Reviewed on: 6/24/16
Updates:
Recommendation:
File 26- White

Petitioner Christopher Vang (Pro Per, father)
 Petitioner Lisa Lee (Pro Per, mother)

Petition for Appointment of Probate Conservator

		NO TEMPORARY REQUESTED CHRISTOPHER VANG and LISA LEE , parents, are Petitioners and request appointment as Co-Conservators of the Person. <i>~Please see Petition for details~</i> Court Investigator's Report was filed on 6/21/2016.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: LEG	
			Reviewed on: 6/23/16	
			Updates:	
			Recommendation:	
			File 27- Vang	

Executor Debra Zahariades (Pro Per, Executor)

Petition for Final Distribution on Waiver of Accounting

DOD: 12/1/2014		DEBRA ZAHARIADES , daughter and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	Continued from 6/21/2016. Minute Order states after the examiner reviews the documents filed this morning and if all is in order, the Court is inclined to sign the order. Examiner notes given.
Cont. from 06		I & A — \$268,000.00	The following issue from the last hearing remains:
<input type="checkbox"/>	Aff.Sub.Wit.	POH — \$254,500.00 (\$2,500.00 cash)	
<input checked="" type="checkbox"/>	Verified		1. <i>Petition</i> does not contain a statement regarding whether notice of the administration of the estate has been sent to the Franchise Tax Board as required pursuant to Probate Code 9202(c)(1) for estates in which Letters were issued 7/1/2008 or after, and Court records contain no proof of service of such notice. Need proof of service of notice to the Franchise Tax Board pursuant to Probate Code 9202(c)(1). (Note: This statement regarding notice is distinct from the statement made in Paragraph 18 of the Petition that a clearance certificate will be filed on receipt from the Franchise Tax Board.) Proof of Service by Mail filed 6/21/2016 shows notice served 4/22/2016 apparently to the <u>incorrect unit at the Franchise Tax Board</u> for clearance certificate for income tax for estates exceeding \$1 million dollars. Notice is required of the <u>petition for administration (now distribution).</u>
<input checked="" type="checkbox"/>	Inventory	Executor — waives	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Distribution pursuant to Decedent's Will is to:	
<input checked="" type="checkbox"/>	Aff.Mail	<ul style="list-style-type: none"> DENISE HARDOY – \$1,250.00 cash, an undivided ½ interest in real property, and an undivided ½ interest in trailer (<i>consent filed 6/21/2016</i>); DEBRA ZAHARIADES – \$1,250.00 cash, an undivided ½ interest in real property, and an undivided ½ interest in trailer (<i>consent filed 6/21/2016</i>). 	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	032415	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	X	
			Reviewed by: LEG
			Reviewed on: 6/23/16
			Updates:
			Recommendation:
			File 28- Palmer

Attorney Summer A. Johnson (for Petitioner Debra Weed, daughter)
 Attorney Melvin K. Rube (Court-appointed for Conservatee)

Petition for Appointment of Conservator of the Person and Estate

		TEMPORARY EXPIRES 6/21/2016; extended to 6/28/2016	NEEDS/PROBLEMS/COMMENTS:
Cont. from 052316, 062116		DEBRA WEED, daughter, is Petitioner and requests appointment as Conservator of the Person and Estate .	Court Investigator Advised Rights on 6/2/2016.
	Aff.Sub.Wit.	~Please see Petition for details~	Continued from 6/21/2016.
✓	Verified	Court Investigator's Report was filed on 6/6/2016.	Minute Order states
	Inventory		Conservatee is not required to come to Court, but is always welcome. Matter continued to 6/28/2016.
	Cap. Dec	X	
	Not.Cred.		
✓	Notice of Hrg		The following issue from the last hearing remains:
✓	Aff.Mail	W/	1. Item 1(g) and Item 9 of the Petition are incomplete (that is, they are not checked denoting a request for medical consent powers.) However, in Attachment 1 (I), Petitioner requests authority to have the proposed Conservatee examined and treated by appropriate physicians skilled in the expertise areas necessitated by her serious medical conditions, and to consent to all non-psychosis and non-dementia related medical treatments. Need a Medical Capacity Declaration in support of Petitioner's request pursuant to Probate Code § 1890(c).
	Aff.Pub.		~Please see additional page~
	Sp.Ntc.		Reviewed by: LEG
✓	Pers.Serv.		Reviewed on: 6/24/16
✓	Conf. Screen		Updates:
✓	Letters		Recommendation:
✓	Duties/Supp		
	Objections		File 29- Weed
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS, continued:

Note: If *Petition* is granted, Court will set status hearings as follows:

- **Thursday, July 28, 2016 at 9:00 a.m. in Dept. 303** for filing of proof of **\$85,000.00** bond.
- **Tuesday, October 25, 2016 at 9:00 a.m. in Dept. 303** for filing of inventory and appraisal; and
- **Monday, August 21, 2017 at 9:00 a.m. in Dept. 303** for filing of first account of the conservatorship estate.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.